# Chapter 1

# Getting Started with Outlook

Outlook is one of the most widely used programs in the world. The latest version, called either Outlook 12 or Outlook 2007 (but simply *Outlook* from here on) takes a great program and makes it even better. What is it about Outlook that makes it the one indispensable program on many people's computers?

The way I look at it, Outlook is the digital version of a Swiss Army knife. It doesn't do just one or two things, it does a whole bunch of things — and equally important, it does them well. You may not need all of Outlook's capabilities, but it's a pretty sure bet that you need some of them.

How many people do you know who don't use email? That's one of Outlook's abilities. How about keeping track of contact information for friends, family, and business associates? That's another. Do you need to schedule meetings, appointments, and social engagements? Outlook can help. This is what makes Outlook so popular — it takes a bunch of commonly needed capabilities and rolls them together into a single well-designed and easy-to-use program.

The key concept here is *productivity*. Outlook is carefully designed to integrate information and tasks in a way that will save you time, errors, and headaches.

This chapter gets you started with Outlook by taking you on a quick tour of all the program features. I think this is the first step in learning any program — you need to know *what* it can do before learning *how* to do it! After a look at all the things you can do with Outlook, the chapter ends with some information about what's new in this version of Outlook.

COPYRIGHTED MATERIAL

## IN THIS CHAPTER

**Outlook overview**

**Messaging**

**Managing contacts**

**Scheduling**

**Organizing information**

**Searching**

**Reading news and other information**

### No Instant Messaging?

Strictly speaking, Outlook by itself does not support instant messaging. You can, however, use Outlook in conjunction with any of several compatible IM services.

Even though you may already be addicted to email, here's a look at some of the reasons it is so popular and why Outlook is such a powerful email client:

- Fast — email messages are delivered nearly anywhere in the world almost instantly. Neither the post office nor FedEx can say that!
- Convenient — you can read email messages at your convenience, which is a lot better than being interrupted by the phone every five minutes.
- Free — there's no cost for sending or receiving messages. At most you'll pay a modest fee for your email account, but it's still a lot cheaper than long distance.
- Flexible — in addition to messages you can use email to send photos and other documents to friends, family, and business associates.
- Forms — Outlook lets you design email forms for exchanging specific information.
- Record keeping — Outlook provides powerful tools for organizing and archiving your received and sent messages.

Email is an important aspect of most people's work and personal lives. With Outlook you have a tool that lets you work with email in an efficient and intuitive manner.

## Messaging

Who could survive in today's connected world without email? Messaging is at the heart of Outlook's capabilities, and you'll even find some people who use Outlook for email and nothing else — although that's a waste in my opinion. In Outlook, the term *messaging* refers specifically to email — Outlook does not work with instant messaging, chat, or other forms of electronic communication.

## Managing Contacts

Information management is Outlook's other main focus, and managing your contacts is an important aspect of that. Outlook's contact management feature is really just a sophisticated address book, but it is designed to be extremely flexible. Figure 1.1 shows an Outlook contact form with an individual's information filled in. This information includes:

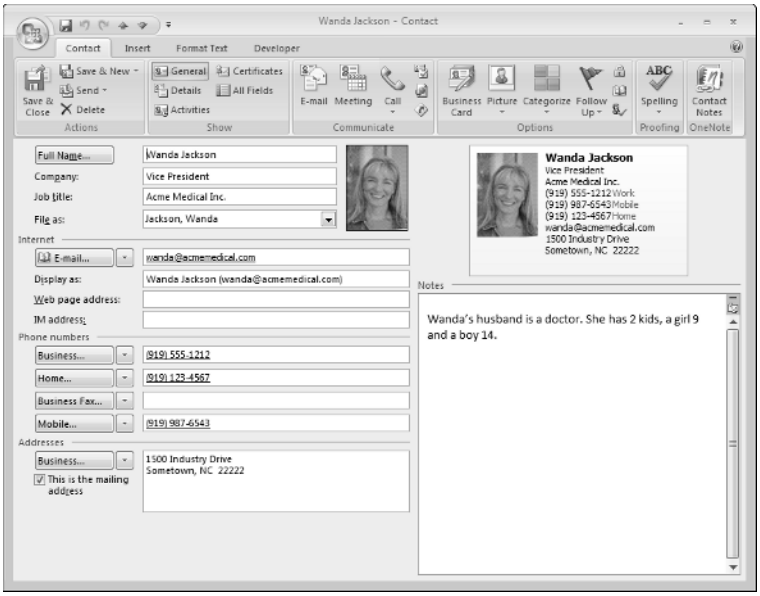
- Name, title, and company.
- Phone numbers for business, home, FAX, and mobile.
- Addresses (business, home, and other).
- A photo.

- Email addresses (as many as needed).
- Web page address.
- Instant messaging address.

Of course a contact entry need not include all this information — many will consist of just a name and email address. However, the capability to enter as much or as little information as needed provides you with great flexibility.

**FIGURE 1.1**

An Outlook contact can contain a wide variety of information.




The real beauty of Outlook contacts is that you can easily use and reuse the information in so many ways. This follows the philosophy that you should have to enter any piece of information just once and then be able to use it wherever and whenever it is needed. Among the things you can do with contact information are

- Address email messages.
- Print envelopes for postal mail.
- Automatically dial a contact's phone number (if your system is equipped with a dialer).
- Share contact information with other people.
- Associate contacts with tasks and schedules.

I am always finding new uses for Outlook contacts — it's a great tool.

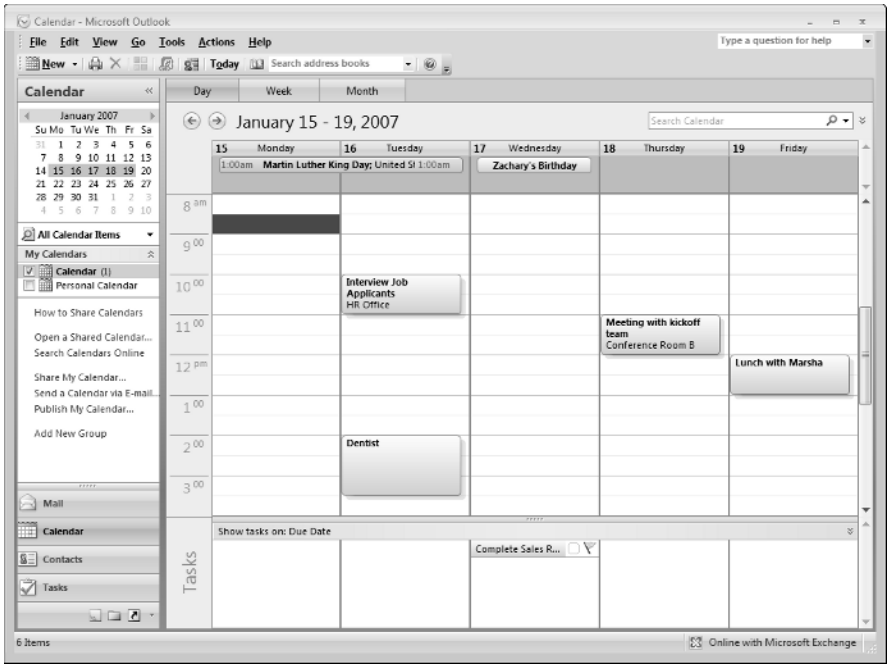
# Scheduling

You say that you have a really busy life? That's a common complaint these days — everyone seems to have more and more to do. It's a lot easier if you can organize your time and find a way to keep track of important tasks. Outlook has two related features, the calendar and tasks, that can greatly simplify the job of managing your schedule.

Figure 1.2 shows Outlook's calendar display. This is a workweek display but you can customize it to show 7-day weeks, single days, or the entire month. The top section is the calendar per se, which shows appointments — items that have a specific start and end time. The lower section shows tasks, items on your to-do list that don't have a specific time frame associated with them (although they may have a due date).

**FIGURE 1.2**

Outlook's calendar displays both appointments and tasks.




Outlook's calendar is much more than a day-timer or similar paper appointment book. Some of its features are

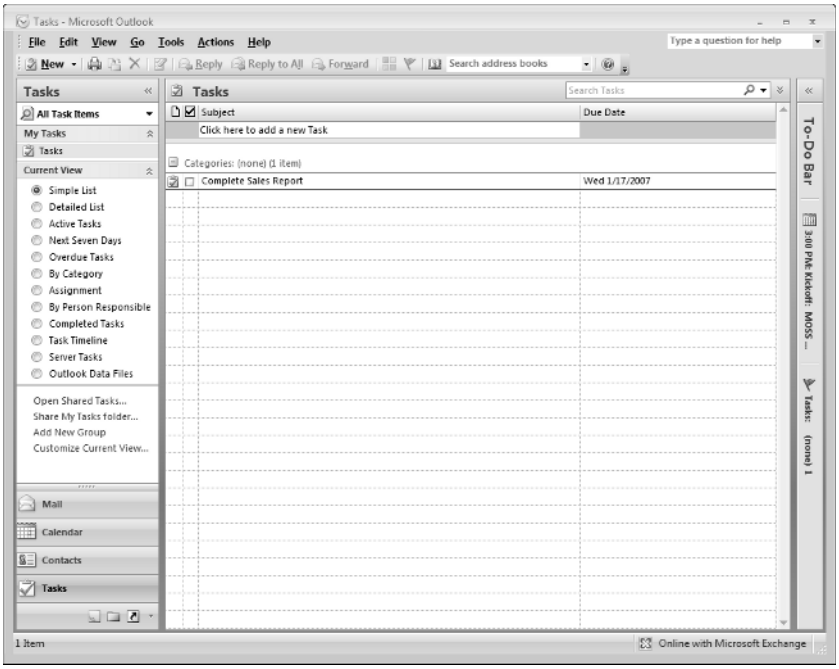
- You can easily schedule a recurring appointment such as the department meeting that is from 9:00 to 10:00 every 2nd Monday.
- You can have it remind you of appointments with a popup message on your screen.

- You can publish your calendar so that your coworkers can view your schedule and not plan meetings or other events when you are busy.
- You can view other people's published calendars when you are trying to schedule a meeting.
- You can use Outlook to invite people to meetings — and they can respond "yes" or "no" using Outlook as well.
- You can create a shared meeting workspace where you can share the agenda, other documents, and post meeting results.

Outlook's task feature is a really sophisticated to-do list. Each task has a start date and a due date and you can tell Outlook to remind you about the task if desired. Each task also has a priority — low, normal, or high — and a status that marks it as Not Started, In Progress, Completed, and so on. You can assign a task to someone else and receive a status report from them when the task is complete. You can view and organize tasks in almost any way you can imagine — overdue tasks, tasks due in the next week, active tasks, tasks assigned to a specific person or category, and so on. Figure 1.3 shows the Outlook task list with active tasks displayed.

**FIGURE 1.3**

Outlook can display your tasks in various ways.




What's more, Outlook has the ability to connect to tasks you have stored in other programs such as Microsoft Project, OneNote, or on a SharePoint Services account.

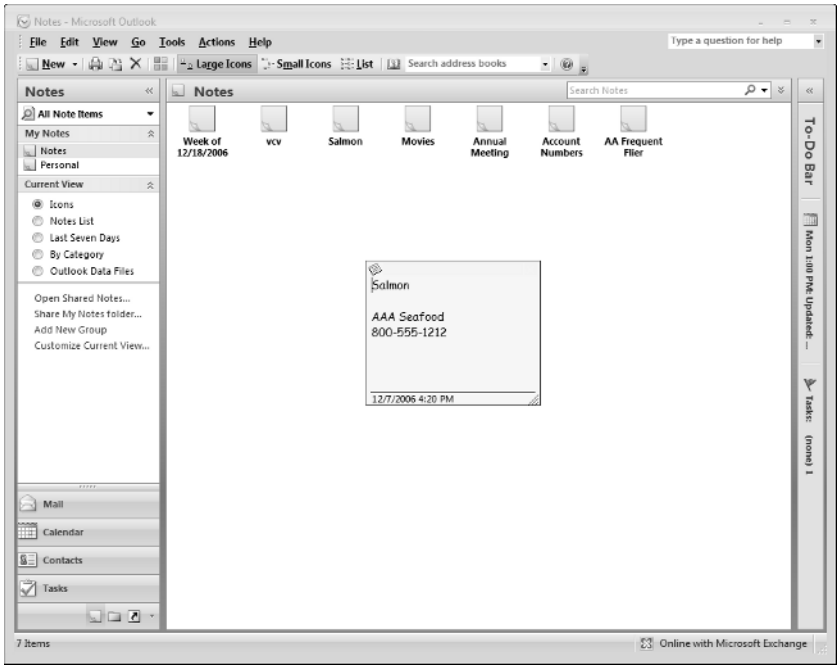
# Managing Information

In addition to contacts and scheduling, Outlook has two other tools for keeping track of information.

Notes are a very simple means for storing small bits of information. I think of them as the computer equivalent of the sticky notes that lots of people have pasted on their monitor and refrigerator. I use notes for things like frequent flier account numbers, to remind me of that mail-order source for great seafood, to make notes about restaurants, and the like. Figure 1.4 shows Outlook's notes display with one note open. It's easy to forward notes to other people using email so you can share the information as desired.

**FIGURE 1.4**

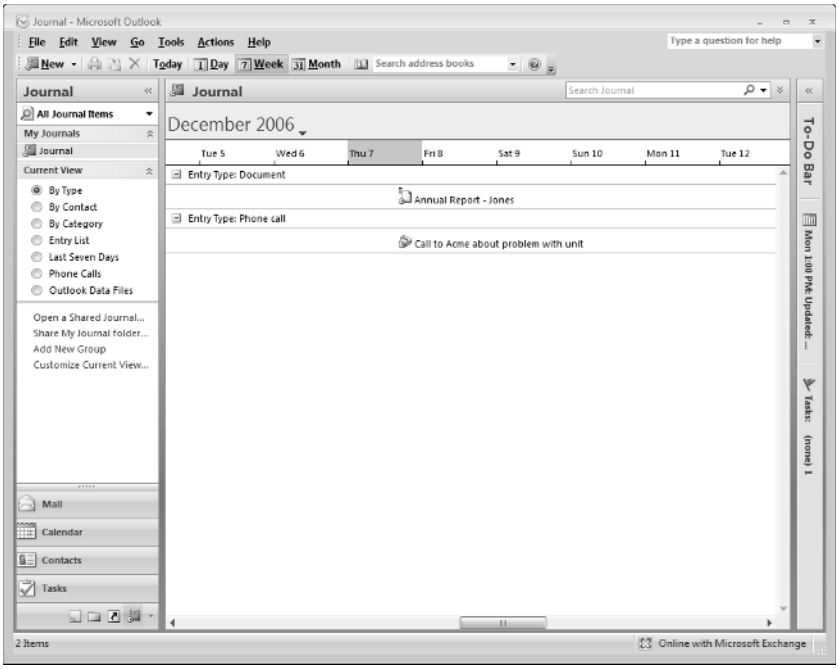
Outlook notes store small pieces of information.




The journal is a sophisticated tool for keeping track of various kinds of information. More specifically, the journal is primarily designed for keeping track of your various activities and the time you spend on them. You can use it to track things like phone calls, working on Office documents, email, and meeting requests. The journal can record certain things automatically and also allows for manual entries. Figure 1.5 shows the Outlook journal display with two items tracked, a phone call and time spent working on a Word document.

**FIGURE 1.5**

Journal entries keep track of the time spent on various activities.




# Mobile Service

It's hard to imagine life before the advent of mobile phones. No matter how much you love your cell, you may love it even more once you team it up with Outlook Mobile Service. In a nutshell, Mobile Service lets you send text messages between Outlook and your mobile phone. When you are away from your computer, you can have task reminders, contact information, and daily calendar information sent right to your phone. You'll have no reason to ever miss an appointment again — even though you might want to!

Mobile Service requires that you register with an Outlook 2007 Mobile Service provider that works with your mobile phone company.

# Categories

Outlook categories are not so much a tool in their own right, like email or the calendar, but they are a feature that can greatly simplify your use of Outlook. Essentially any of the items that Outlook works with, such as email messages, appointments, and tasks, can be assigned to a category. You can use Outlook's predefined categories or, like most users, create your own such as Work, Personal, and so on. Assigning categories to these items makes organizing them and finding needed information a whole lot easier.

# Searching

Knowing that you have some information is one thing — and finding it can be something quite different! Outlook provides sophisticated search capabilities within all the various types of information it works with. Outlook lets you search by category, keyword, date, and other flexible criteria to locate items in email, tasks, and all the other kinds of information Outlook works with. Instant Search is integrated into Outlook so it is always available right when you need it.

# Getting News and Other Information

Really Simple Syndication, or RSS, is a method for content publishers to make information available to subscribers. News, sports, blogs, weather — you name it and it is probably available via an RSS feed. Some other terms for RSS feeds are XML feeds, Web feeds, RSS channels, and syndicated content. RSS feeds are not new but the ability to read them in Outlook is.

Figure 1.6 shows the MSNBC Headlines RSS feed displayed in Outlook. In some ways an RSS feed works like email. Each "message" has a subject and content, and can contain links to other material as well. Outlook provides you with a list of RSS feeds you can subscribe to. You can also subscribe to other feeds as long as you have the required information.

# Security

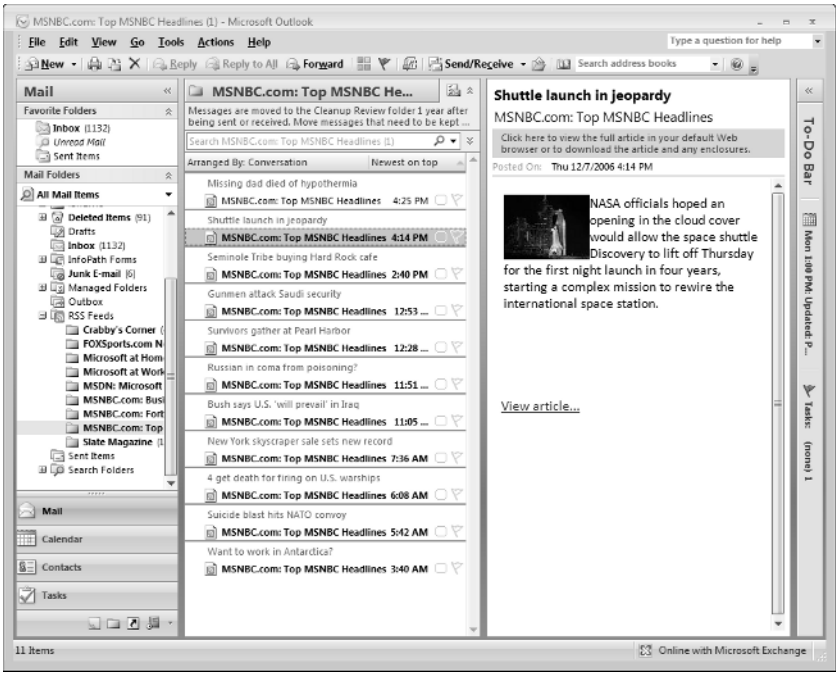
Unfortunately, security is an important concern these days. The term security encompasses a number of different things including the following:

- Protecting messages from prying eyes.
- Using digital signatures to guarantee identity.
- Preventing problems caused by malicious attachments and macro code.
- Avoiding infection by viruses and worms.

Although there is no foolproof security solution, Outlook provides a full set of tools that can help you to minimize your risks.

**FIGURE 1.6**

Viewing RSS feeds in Outlook.


MSNBC.com: Top MSNBC Headlines (1) - Microsoft Outlook
File Edit View Go Tools Actions Help
Type a question for help
New Reply Reply to All Forward Send/Receive Search address books
Mail
Favorite Folders
Inbox (1132)
Unread Mail
Sent Items
Mail Folders
All Mail Items
Deleted Items (91)
Drafts
Inbox (1132)
InfoPath Forms
Junk E-mail [6]
Managed Folders
Outbox
RSS Feeds
Crabby's Corner
FOXSports.com N
Microsoft at Hom
Microsoft at Work
MSDN: Microsoft
MSNBC.com: Busi
MSNBC.com: Fort
MSNBC.com: Top
Slate Magazine
Sent Items
Search Folders
Mail
Calendar
Contacts
Tasks
MSNBC.com: Top MSNBC He...
Messages are moved to the Cleanup Review Folder 1 year after being sent or received. Move messages that need to be kept ...
Search MSNBC.com: Top MSNBC Headlines (1)
Arranged By: Conversation Newest on top
Missing dad died of hypothermia
MSNBC.com: Top MSNBC Headlines 4:25 PM
Shuttle launch in jeopardy
MSNBC.com: Top MSNBC Headlines 4:14 PM
Seminole Tribe buying Hard Rock cafe
MSNBC.com: Top MSNBC Headlines 2:40 PM
Gunmen attack Saudi security
MSNBC.com: Top MSNBC Headlines 12:53 ...
Survivors gather at Pearl Harbor
MSNBC.com: Top MSNBC Headlines 12:28 ...
Russian in coma from poisoning?
MSNBC.com: Top MSNBC Headlines 11:51 ...
Bush says U.S. 'will prevail' in Iraq
MSNBC.com: Top MSNBC Headlines 11:05 ...
New York skyscraper sale sets new record
MSNBC.com: Top MSNBC Headlines 7:36 AM
4 get death for firing on U.S. warships
MSNBC.com: Top MSNBC Headlines 6:08 AM
Suicide blast hits NATO convoy
MSNBC.com: Top MSNBC Headlines 5:42 AM
Want to work in Antarctica?
MSNBC.com: Top MSNBC Headlines 3:40 AM
Shuttle launch in jeopardy
MSNBC.com: Top MSNBC Headlines
Click here to view the full article in your default Web browser or to download the article and any enclosures.
Posted On: Thu 12/7/2006 4:14 PM
NASA officials hoped an opening in the cloud cover would allow the space shuttle Discovery to lift off Thursday for the first night launch in four years, starting a complex mission to rewire the international space station.
View article...
To-Do Bar
Mon 1:00 PM: Updated P...
Tasks: (none) 1
11 Items
Online with Microsoft Exchange

# Custom Solutions

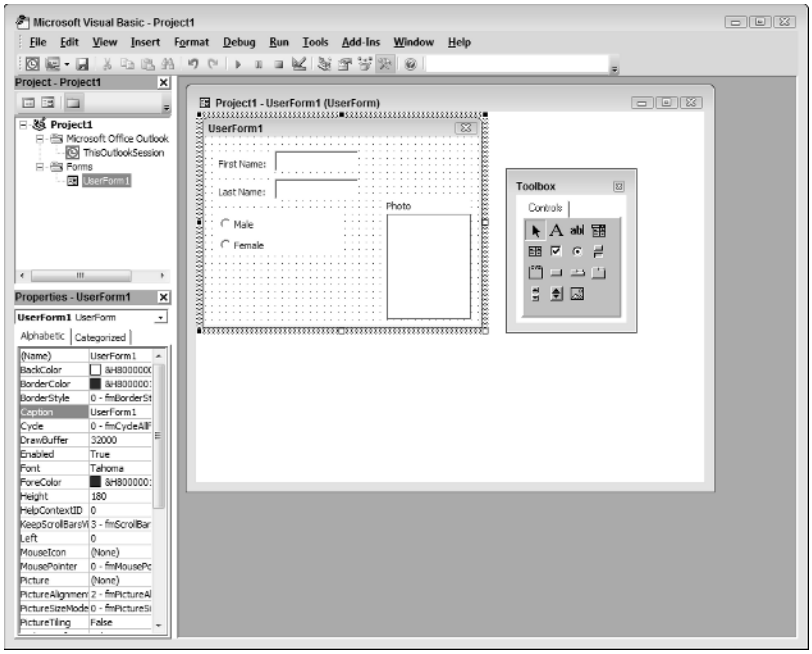
No matter how well designed it is, no application can be a perfect match for each user's individual needs. This is why Outlook provides several customization features that let you tailor it to the way you work and the tasks you need to perform.

One of these features is VBA programming. VBA stands for Visual Basic for Applications, sometimes just called Visual Basic. VBA is a powerful programming language that is built in to Outlook and the other Office programs such as Word and Excel. VBA provides the developer with access to all of Outlook's features and data. You can write programs, or macros, that automate tasks involving email, contacts, appointments, and so on. When there's an even modestly complex task that you perform regularly, automating it with a macro can save you both time and errors. Note that unlike some other Office programs Outlook does not allow you to record macros — you must program them manually — but once you understand the basic concepts it's not particularly difficult.

Another customization feature is userforms. A userform is, in essence, a dialog box that you have designed for the display and/or input of information. Used as part of a VBA macro, a userform provides data display and input that is customized for precisely what you need. Figure 1.7 shows a userform being designed in the form designer.

**FIGURE 1.7**

Designing a userform for custom data handling.




# What's New

If you have used an earlier version of Outlook you will be glad to know that there have been no fundamental changes to the program. There is a new user interface, but most of the changes involve the addition of new features and enhancement of old ones. This section takes a look at the most important of these new and improved features.

## New User Interface

Outlook's user interface has actually changed less than that of other Office programs. The main screen, shown in Figure 1.8, retains the main menu and the toolbar that were present in earlier versions of the program. The Outlook Today and folder views remain essentially unchanged as well.

Things are quite different, however, when you get to the windows you use to work with email messages, contacts, and so on. Microsoft has abandoned the menu and toolbar approach for a system of tabs and ribbons, as you can see in Figure 1.9. This figure shows an email window with four tabs across the top — Message, Insert, Options, and Format Text. Clicking a tab displays the associated ribbon, which provides access to buttons, menus, and dialog boxes for the related tasks.

The Outlook screen is covered in detail in Chapter 2.

**FIGURE 1.8**

The main Outlook screen retains the menu and toolbar of earlier versions.

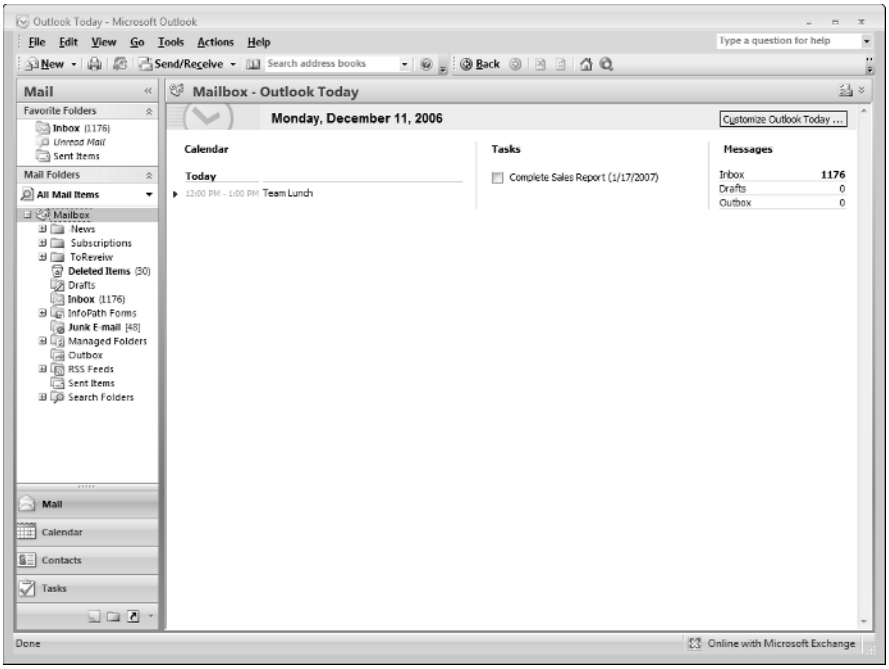
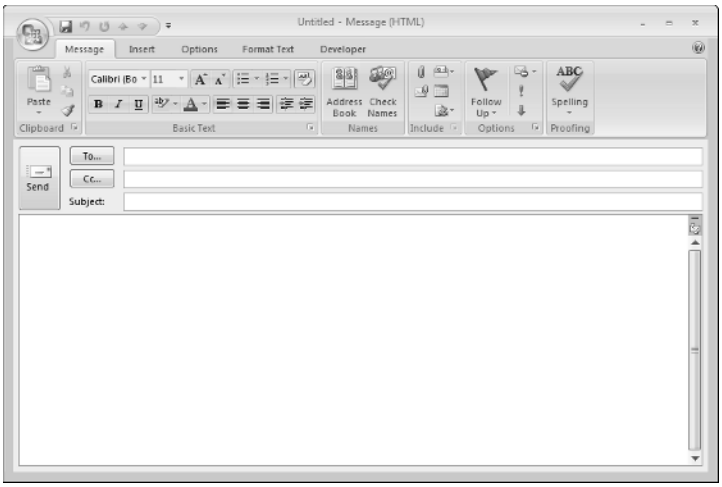



**FIGURE 1.9**

Other Outlook windows use the new tabs and ribbon look.



## Instant Search

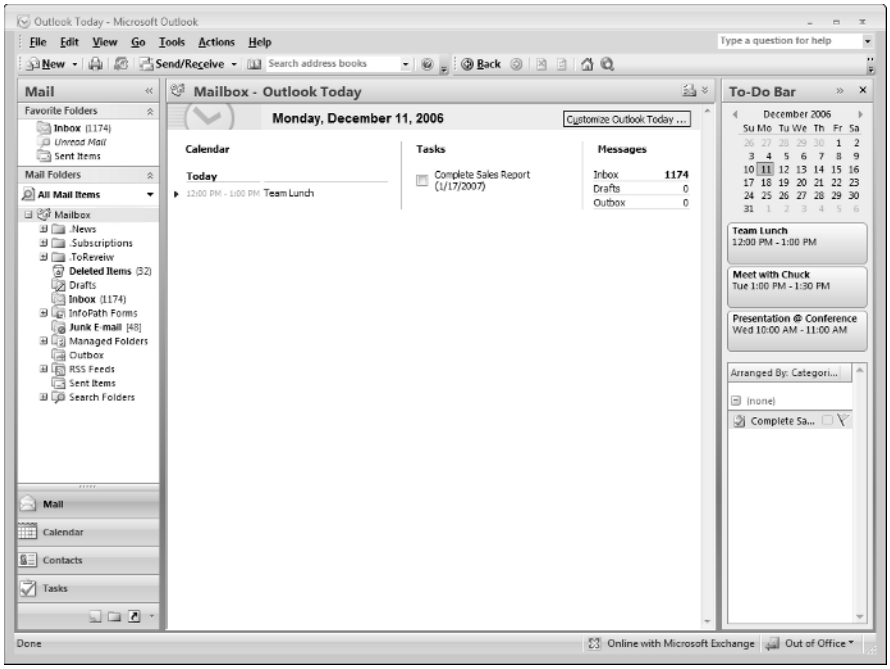
In a single step you can search through all your email messages, attachments, contacts, tasks, and calendars to find the information you are looking for.

## To-Do Bar

The To-Do Bar, shown in Figure 1.10, provides a convenient, consolidated view of tasks, appointments, and emails that you have flagged for follow-up. You'll have no more excuses for forgetting something!

**FIGURE 1.10**

The To-Do Bar lets you view your daily priorities.




## Color Categories

Outlook's categories are now coded by color. This makes it a lot easier to scan a list of items and pick out the high-priority ones.

## Mail as Tasks

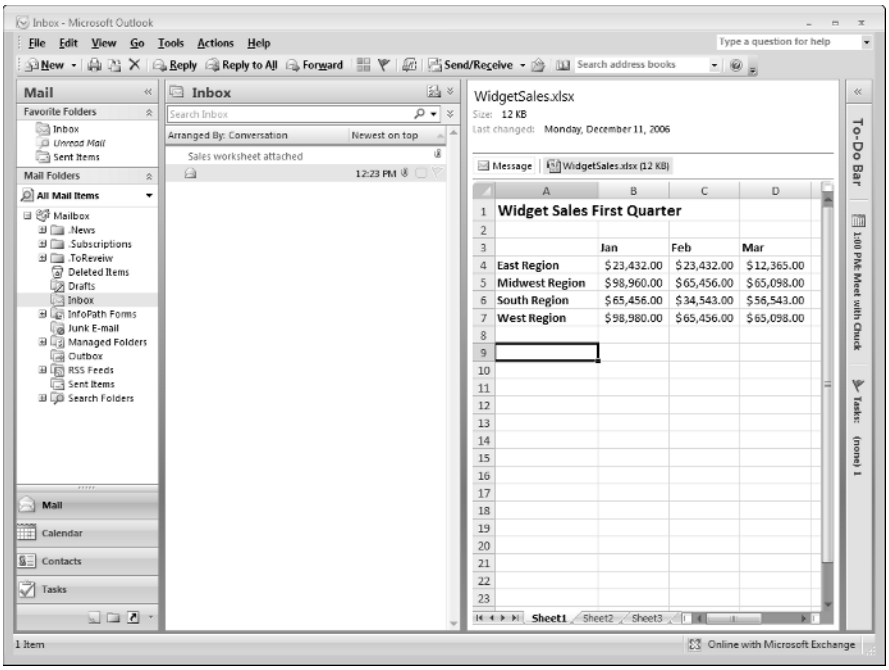
Outlook now lets you flag an email message as a task, greatly simplifying the process of defining a task based on a message you have received.

## Attachment Previewer

No longer do you need to open an email attachment in its native application, such as Word or Excel, to see what it contains. This can save a lot of time because these native applications are often rather slow to open. In addition, the attachment previewer is safer because, unlike the native application, it cannot run any malicious macros that may be part of the document. Figure 1.11 shows an Excel workbook that was received as an email attachment being previewed.

**FIGURE 1.11**

The attachment previewer lets you view the content of email attachments without opening them.




## Calendar Features

Several new capabilities make Outlook's calendar even more useful:

- Calendar publishing makes it easy to share your calendar information with others.
- Calendar snapshots let you share your calendar information with people outside your organization.
- Calendar overlay mode makes it possible to view multiple calendars at the same time.

## RSS Feeds

Outlook now provides integrated RSS (Really Simple Syndication) capabilities. You can view RSS information just like you would email messages.

## Automated Account Setup

For certain kinds of email accounts, Outlook now offers an automated account setup process that lets you set up your account with only your email address and password — no more searching around to find the email server addresses!

## Anti-Spam and Anti-Phishing

New and improved anti-spam and anti-phishing tools help protect you from junk email and malicious messages.

## Email Postmarks

The new email postmark feature is an anti-spam tool. A message you receive that is postmarked is less likely to be from a spammer and more likely to be from a legitimate source, and Outlook can take that into account when deciding which messages are spam and which are not. Likewise, if you postmark messages that you send, the recipients may be able to use the postmark to determine that your message is probably not spam.

# Summary

This chapter has provided you with a quick overview of what Outlook can do for you. You have also taken a look at some of the features that are new and improved in the most recent version of Outlook. I think you'll agree that Outlook is a jack-of-all-trades, providing capabilities that almost everyone needs on a regular basis. With all this power, Outlook is unavoidably somewhat complex. The remainder of this book shows you the ins and outs of Outlook so that you will soon be putting this powerful program to work to simplify and organize your own busy life.

Chapter 2 looks at the basics of installing and using Outlook.